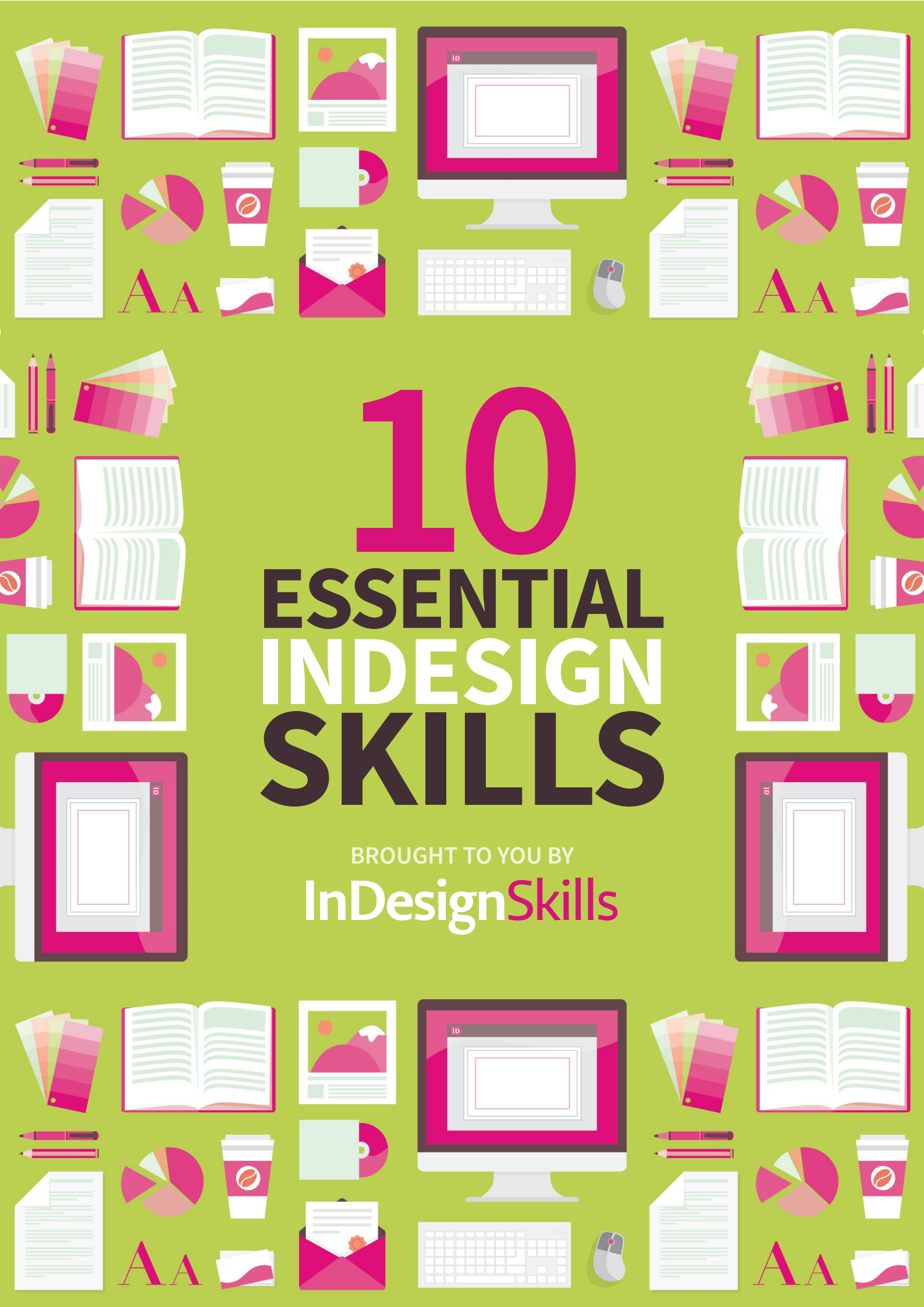
10
ESSENTIAL
INDESIGN
SKILLS
BROUGHT TO YOU BY
InDesignSkills

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Contents

In this eBook you'll find 10 Essential InDesign Skills for creating any document in Adobe InDesign. You can keep the tips here handy as a checklist for whatever InDesign project you're working on.

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1

Prep for print in advance

Before you even create a New Document in InDesign, you should consider the end result.

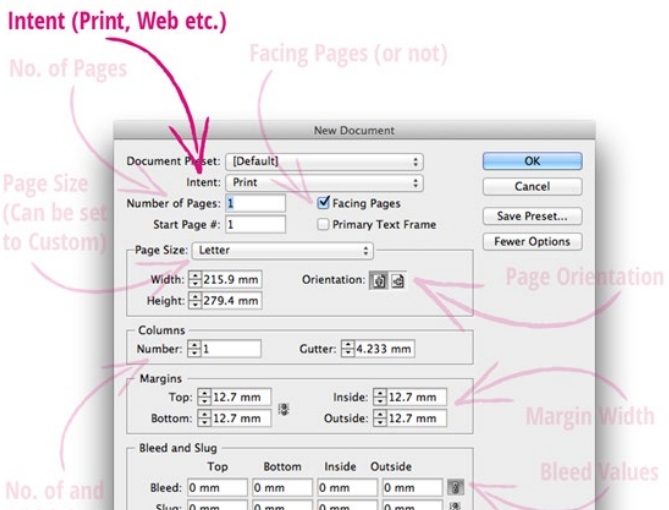
What are you creating? Is it a book, brochure, newsletter, magazine? Will the document be printed in-house (i.e. on a basic PC printer) or will you be sending the document to a professional printer?

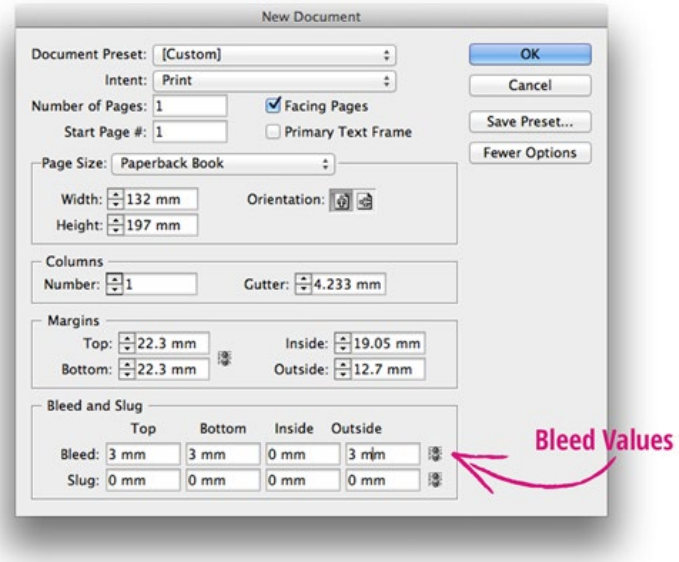
If you're creating a print document for professional litho or digital printing, the printer will usually expect you, the designer, to prepare a document that is print-ready. This saves time and money, and also means that you effectively 'lock' your PDF print file once it's sent on to the printer. Nobody can dip into your InDesign file and alter anything you wouldn't want them to, mistakenly or otherwise.

You should consider how your print-ready file should be prepared *before* you create a New Document in InDesign. You may want to get in touch with your printer before starting work to check their preferences for print-ready files. You can check a few things when you create your document to ensure you'll end up with a print-ready document, prepped for export *(see Page 13)*:

Open InDesign and either select **New Document** from the **Welcome** window, or go to **File > New > Document** from the menu at the top of your screen.

In the **New Document** window, ensure the **Intent** is set to **Print**.





You should also be sure to enter values for the **Bleed** if your document will have any colors, images, shapes or other elements which will cross the edge (**Trim**) of the **Page**.

The **Bleed** is an extra space beyond the edge of the page which acts as a margin of error when the document is trimmed. To avoid a visible white line along the edge of your document, you should always include a bleed.

If you are creating a document where all the edges of the page will be visible on the final product (e.g. a poster, a business card or a folded brochure) you should set a bleed on all sides. If your document has an edge that will not be visible (e.g. a bound book, where the inside edge will be sucked into the binding), you should set a bleed on all sides except the **Inside** edge. ●

2

Page number your Masters

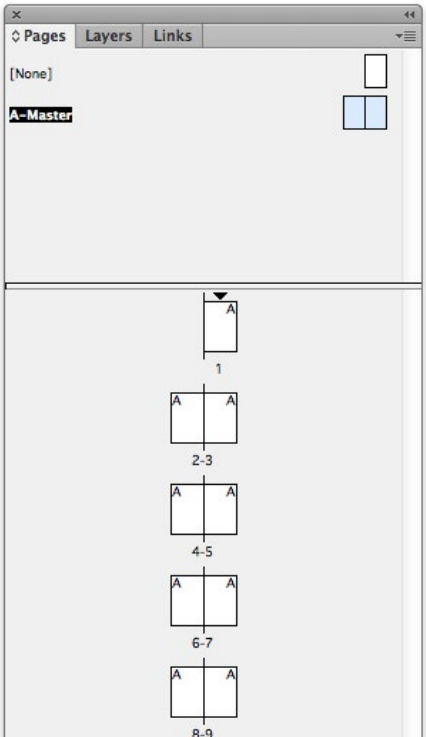
If you're creating a document which is moderately lengthy, like an Annual Report, or very long, like a book, you should apply Page Numbers. The most efficient way to do this is to add them to a Master Page.

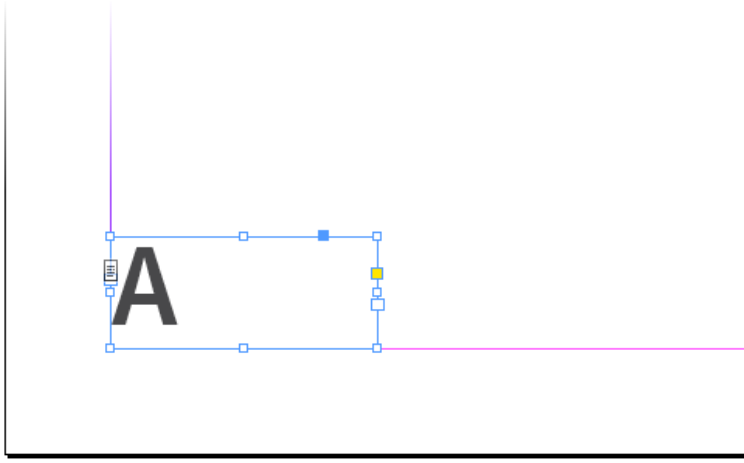
We all like to be organized, so help the readers of your document find their way around with ease by including a simple numbering system.

First, you'll need to set up a **Master Page**.

You'll notice in the **Masters Panel** (which sits at the top of the **Pages Panel**, go to **Window > Pages** to open) that there is already a default Master page, called ***A-Master,*** which was created along with your new document. That's useful! We can apply our page numbers to that.

Double-click the page icon to the right of the ***A-Master*** name to bring up the **Master Page** on screen. If your document had **Facing Pages** checked in the **New Document** window, there will be two pages forming a facing spread. If not, there will just be a single page.





Select the **Type Tool (T)** from the **Tools** panel (**Window > Tools**) and drag to create a small text frame. Position this at the bottom of the page, centrally on a single-page spread, or in opposing corners on a facing spread.

With your cursor sitting in the text frame, go to the top menu and **Type > Insert Special Character > Markers > Current Page Number**. A default ***A*** character will appear in the frame.

You can apply formatting to your page number marker using the options available to you in the Character Formatting Controls panel (see Page 6). Once you've done that you can apply the Master to pages in your document. All pages with the Master applied to them will show the relevant page number.

To apply the Master to individual pages, **drag and drop** the Master's page icon in the **Pages Panel**, dropping the icon onto the relevant page icon within the same panel.

To apply to a group of pages, click on the group of three bars at the top-right of the **Pages Panel** to open a drop-down menu. Select **Apply Master to Pages...** and enter your desired page range in the **Apply Master** window. ●

3

Typography basics

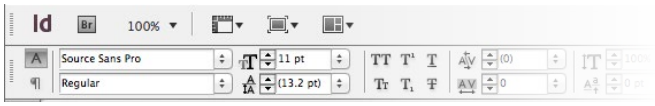
InDesign offers a number of options for setting typography formatting and ensuring your text styling stays consistent throughout your document.

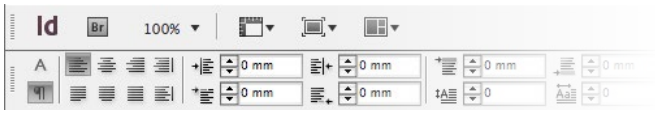
Once you've created a text frame using the **Type Tool (T)** and inserted text into the frame you can begin to define the formatting. At first, just set the formatting for the first paragraph of your text.

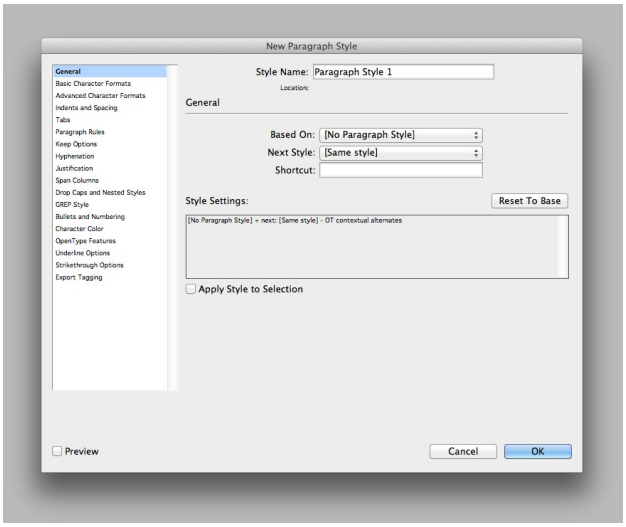
The first feature to note is the **Character Formatting Controls**. This panel runs along the top of your screen and will appear by default when you open InDesign (or go to **Window > Control** to open).

From here you can set the **Font, Font Weight** (Regular, **Bold**, *Italic* etc), **Sizing, Leading** (space between lines of text), and **Text Color**, as well as more advanced settings like **Drop Cap Number of Lines, Indents, Kerning** (the space between two individual characters) and **Tracking** (adjusts the space between characters uniformly over a group of letters).

You can switch between the Character Formatting Controls and the **Paragraph Formatting Controls**, which sits in the same panel, by clicking the ¶ icon to the left of the panel. Here you can alter the arrangement of the text, setting the **Alignment** of paragraphs, and again it offers the option to set **Indents, Drop Caps** etc.







Once you are happy with the formatting of your first section of text, you can tell InDesign to remember these settings by creating a **Style**.

Sit your **Type** cursor within the paragraph of text you have formatted, then go to **Window > Styles > Paragraph Styles**. From the drop-down menu (click on the three bars at the top-right of the panel) select **New Paragraph Style**. **Name** the Style appropriately (e.g. ***Body Text*** or ***First Paragraph of Chapter***), then click **OK**.

To apply the style to other sections of text in your document, either insert the **Type** cursor into the relevant paragraph, or highlight the bulk of text you want to apply the style to, and click on the **Style Name** in the **Paragraph Styles** panel.

You can also set **Styles** for individual **Characters**. For example, you might want to create an occasional colored, Bold, All Caps **WORD** within your text. You can set this as a **Character Style** in the same way you would a Paragraph Style. Go to **Window > Styles > Character Styles** and create a New Style, as above. Then to apply the **Style**, highlight relevant letters and click on the **Style Name** in the panel. ●

4
Threading text

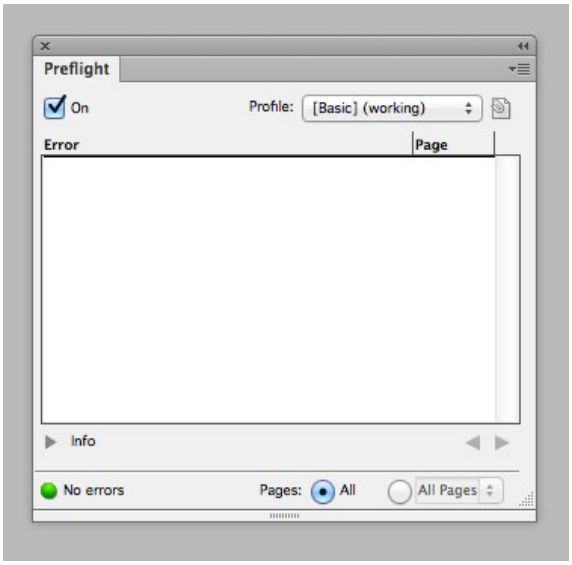
If you have a document with lots of text you'll have to create multiple text frames. 'Threading' is how you connect the frames to allow text to flow through them.

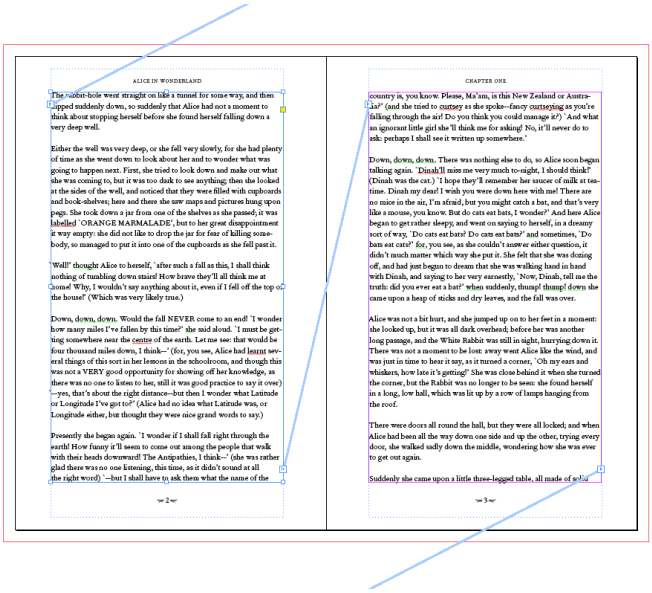
Once you have created a text frame and inserted text into it (perhaps by **Edit > Pasting** from a Word doc. or by **File > Placing** the entire Word doc.) you may find there is too much text to sit in the frame without overflowing. You will see a small red + symbol at the bottom right-hand corner of the text frame.

The first thing to do is to set up a series of text frames to allow the text to flow into. Select the **Type Tool (T)** and drag to create new frames across the page(s) of your document.

Return to the first text frame and click once on the + symbol to **load the cursor** with text. A tiny script symbol will appear next to your cursor.

Hover over the next text frame and click once inside it. The text will flow into the frame. Continue this process until all your text is contained within text frames.





A green **No errors** notice will appear at the bottom left of the screen (from the **Preflight** panel) once all the text is visible in the document.

To view how the text frames are connected go to **View > Extras > Show Text Threads**. In **Normal Mode** (**View > Screen Mode > Normal**, or tap **W** on the keyboard), when you select a text frame, you will see the **Threads** connecting the frames, showing how the text is ordered throughout the document.

TOP SKILLS TIP: Sometimes you might want to empty a text frame of some or all of the text that is overflowing. When this is book-length, highlighting and deleting overflowing text manually is neither practical or fun! Place your cursor at the end of the section of text you want to keep, then press **Ctl/Cmd-Shift-End** to select all the remaining overflow text, and hit **Delete**.

5
Creating a Book File

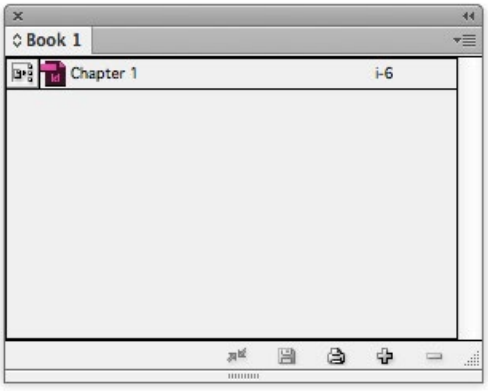
If you're creating a long document with multiple sections, e.g. chapters, you should create a Book File to better organize the large file.

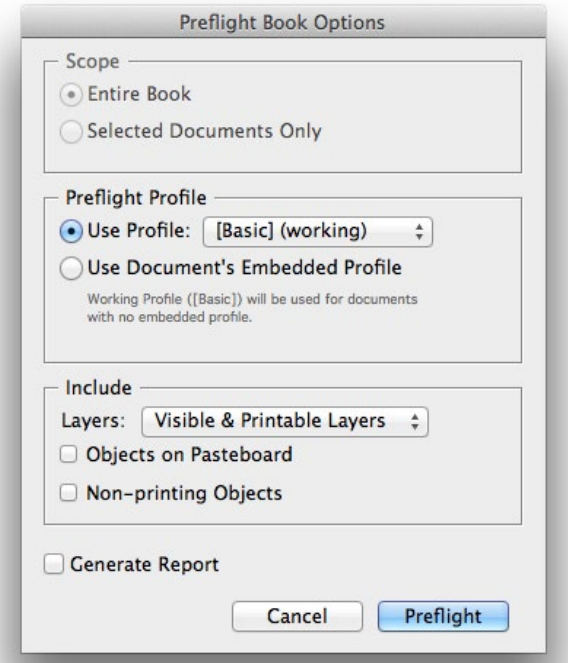
Before you create a **New Document** for your book in InDesign you should first create a separate **Book File**. A Book File brings together a number of different documents (e.g. you might create a separate document for each chapter of a Book, or section of a Report) into a single panel.

The numbering system is carried forward over each document included in the Book File, and is automatically updated when you make a change. So, for example, if you add an extra page to Chapter 5, all the other later Chapters in the Book will have their page numbers updated accordingly.

To create a Book File, either select **New...Book** from the **Welcome** window when you open InDesign, or go to **File > New > Book**. You will be prompted to give the Book a **Name**, and to **Save** it in an appropriate place.

The Book will open as a small panel in InDesign. When you click the **+** icon at the bottom right of the panel, you will be asked to locate an InDesign document to add to the Book. You should create your chapter documents first, as basic templates, before adding them in the correct order to the Book.





Be sure to include a simple **page numbering** system (*see Page 5*) throughout your documents. These page numbers will appear in the Book panel, to the right of the relevant chapter name. The Book File makes editing individual pages very simple - you can easily see and click on the document containing the page you want to edit.

When you've filled up your Book File with all your documents and are happy with the final result, you can **Preflight** the Book (check for errors) by clicking on the drop-down menu in the Book panel **> Preflight Book.**

Once all errors have been corrected, you can export the Book for print by selecting **Export Book to PDF...** from the drop-down menu in the Book panel. ●

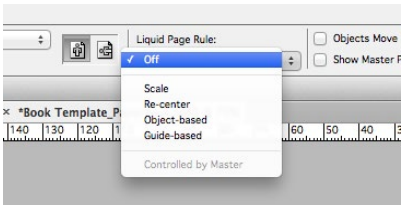
6
Page dimensions & orientation

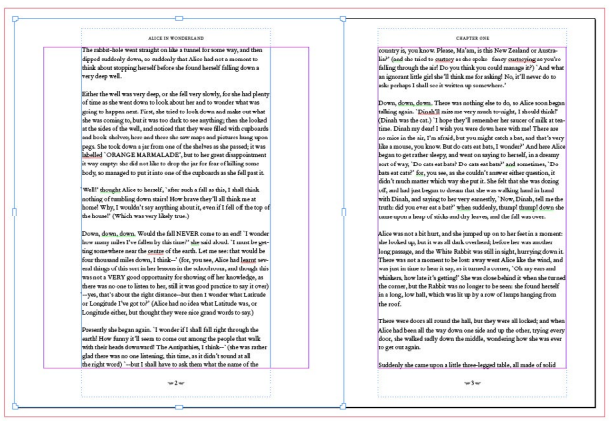
Sometimes you will create an InDesign document, only to realize that you want to insert a page with different dimensions or orientation, like a pull-out page or a flipped spread. Here's how to do it...

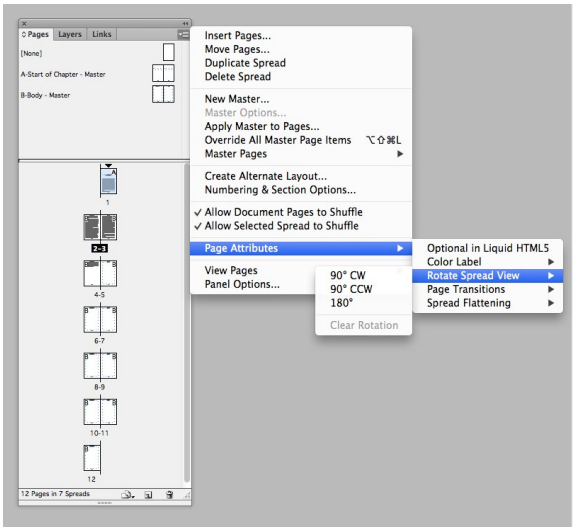
The **Page Tool** is a super useful little tool in InDesign. You can find it in the Tools panel running along the left of your screen (or Window > Tools if not already open).

The **Page Tool** allows you to select an individual page and redefine its dimensions. Select the **Page Tool** and hover over a page in your document which you'd like to alter. Click once and handle-bars will appear on the edges of the page.

You can drag the handles to preview a new page size before manually entering the dimensions of the page in the control panel running along the top of the screen. You can also define how the content currently on the page will sit on the new page. In the example here, I chose to **Re-center** the content.







You can also switch the **Orientation** of a page once you've created your document. InDesign gives you the option of rotating the view of a selected page, which gives you better control when putting together a landscape spread within an otherwise portrait-orientated document.

Go to the **Pages Panel** (**Window > Pages**) and click the three bars at the top-right of the panel to open the drop-down menu. With the relevant page selected in the **Pages Panel**, select **Page Attributes > Rotate Spread View >** and select a rotation value.

🎓 **TOP SKILLS TIP:** So you've created a whole InDesign document but now your boss wants it **US Letter** size, not **A4**. Nightmare right? Well, with a quick tip you can avoid a frustrating problem.

If you go straight to **File > Document Setup...** and edit page dimensions there and then, your changes will only take effect on the selected page. Instead, hop over to the **Pages Panel** and hold **Shift** to click and select all the pages in your document. Go back to **File > Document Setup...**, make your edits and they will take effect across the whole document. ●

7

Placing & Linking images

There are some basic rules about inserting images in InDesign. Once you're clued up you can create all sorts of dynamic image-filled documents.

The first key rule to remember is that images are **Placed** and **Linked** in InDesign. They are **not embedded**, as you might do with a Word Document or in Photoshop.

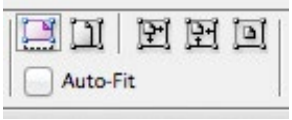
When you **Place** an image, InDesign remembers the **Link** to that image's location in the relevant folder on your computer. This means you can work quickly and efficiently without dealing with a large quantity of heavy images slowing down your work flow. If you move an image to another location on your computer, i.e. another folder or drive, InDesign will be unable to locate the image and will flag up a warning in the **Preflight** panel (**Window > Output > Preflight**).

The second rule to remember is that InDesign places images within a **Frame**. Whether you prepare a frame before placing the image, or you place the image straight into the document (**File > Place**) InDesign will contain the image within a four-sided frame by default.

You can choose from three **Frame Shapes** in the Tools panel (**Window > Tools**), **Rectangle, Ellipse and Polygon**. These are marked out as different to the **Shape Tools** by a **x** shape running through the center of them.

Select a **Frame Tool**, and click and drag to create a frame (hold **Shift** to create a perfect shape). With the frame selected, go to **File > Place** and select an image. Click **Open**.

You can arrange the image in the frame by double-clicking to select the image itself within the frame (it will be marked by a brown line around the edges) and holding **Shift** while readjusting. Or you can choose from the options available to you in the control panel which appears at the top of the screen. **Fill Frame Proportionally** is usually a good option to pick.



After inserting images, you can go to **Window > Links** to view the **Links Panel** and deal with any images that might be missing. These will be flagged up with a **!** symbol. Click on the name in the panel to select the missing image and select the icon to locate the missing image on your computer.

8

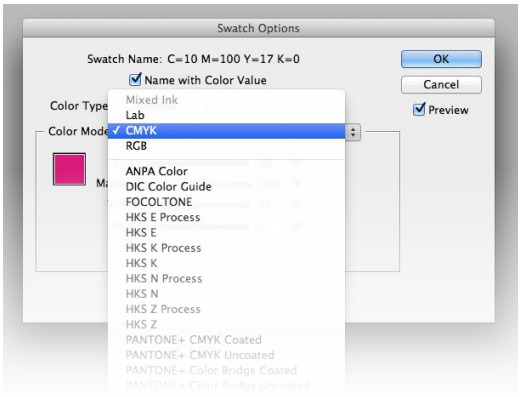
Swatches & color

InDesign is primarily designed for creating print documents, which means it works by default in CMYK color when you set the Intent of your document to Print. You should know a little about how InDesign translates Swatches to final printed colors on your document before sending anything to print to avoid any problems at the press.

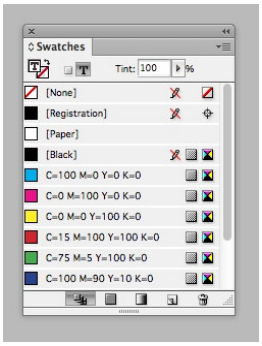
InDesign offers lots of different modes of color that you can use in the program, but the ones you need to know about are **CMYK, Pantone** and **RGB**.

If you're creating a document for print, you should always set colors as **CMYK Swatches**, unless instructed directly otherwise by your printer (e.g. if they would recommend printing a certain color as a **Pantone**). InDesign will automatically work with **CMYK** swatches when you set the **Intent** to **Print** in the **New Document** window.

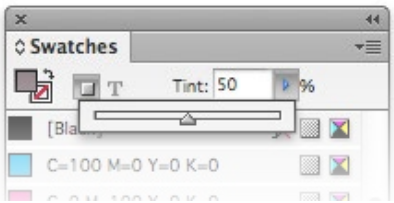
To view the color **Swatches** when you create a new document, go to **Window > Color > Swatches**. A default set of **CMYK Swatches** will already be available to you in the **Swatches Panel**. To add a new swatch click on the three bars at the top-right of the panel to open the drop-down menu. Select **New Color Swatch...** and set the **Color Type** to **Process** (**not Spot**, unless you want to create a **Spot Color Layer** in your final PDF) and **Mode** to **CMYK**. Click **Add**, and **OK**.



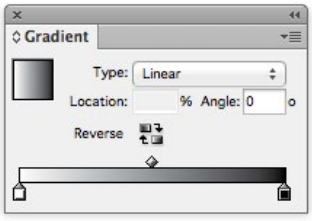
To apply a color to text, a shape or a frame in your document, select the element and apply the swatch from either the **Swatches Panel** or the control panel running along the top of the screen. You can apply a **Fill** and/or a **Stroke** color by switching between the two square symbols in the top control panel or at the bottom of the **Tools Panel**.



To apply a **Tint** of a color to an element, select the element and apply the swatch as above. In the **Swatches Panel**, or from the top control panel, click the arrow adjacent to **Tint: 100%** to adjust the saturation of color.



You can also apply a **Gradient** effect to a colored element by going to **Window > Color > Gradient**.

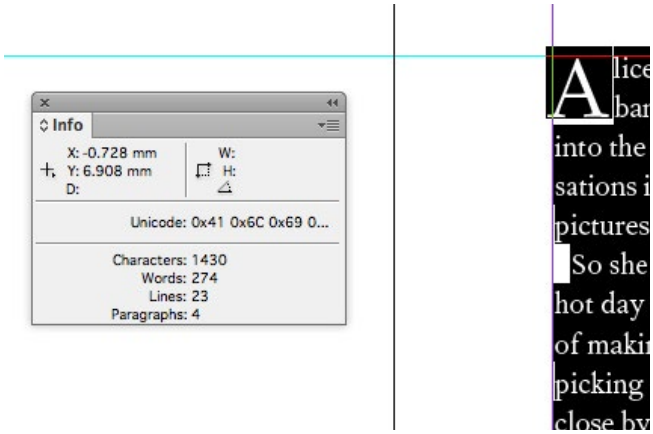


9

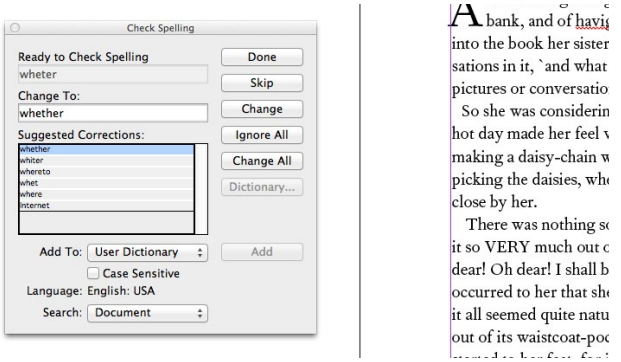
Proofing & Preflight

Once you've completed your document, you can proof it in a similar way to how you would proof a Word Document, but there are additional tools to help ensure you have a perfected technical finish to your document too.

You can conduct a **word-count, character-count, paragraph-count** and **line-count** using the **Info Panel** (**Window > Info**). Highlight the text to generate the counts.

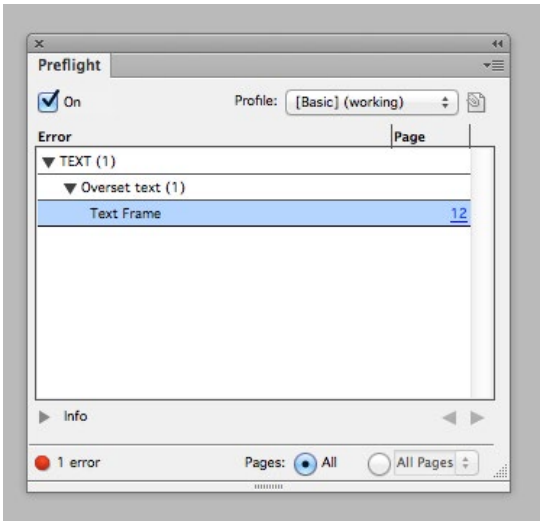


To conduct a spell-check go to **Edit > Spelling > Check Spelling** to view highlighted errors. The **Check Spelling** window will give you possible corrections for each error, and invite you to **Change** or **Skip** them. When you're finished, click **Done**.



Before you export your document to print (*see Page 13*) you should perform a **Preflight** to highlight any potential technical errors in your document. InDesign will alert you of any **Preflight** errors when you go to **Export** to PDF, but the best thing to do is open the **Preflight Panel** before exporting and go over the errors in detail.

Common errors are **missing fonts, text overflowing frames** and **missing links**. These will be flagged up in **red** in the **Preflight Panel**. You can click the arrow next to the listed error to view more details. Ensure these problems are resolved before you go to export your document.



TOP SKILLS TIP: Before you even finish your document InDesign can help you avoid spelling errors as you work. You can enable **Dynamic Spelling**, which underlines potential spelling mistakes as you work, by setting your **Spelling Preferences**. Go to **Edit > Preferences > Spelling** (Windows) or **InDesign > Preferences > Spelling** (Mac OS) and check **Enable Dynamic Spelling**.

10
Exporting for print

Your document's ready and proofed, now it's time to export it as a print-ready document for the press. Read on to learn how to create a print-ready product every time that will keep your printer happy...

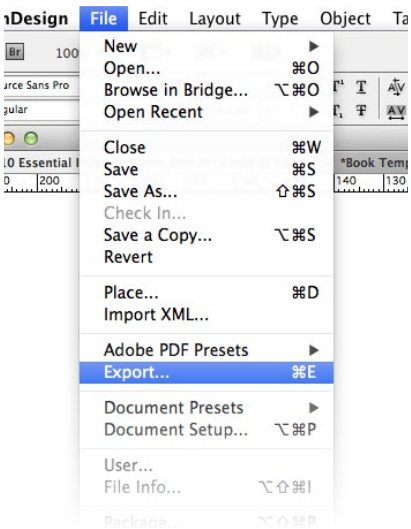
Different printers have different preferences for how they would like to receive documents for printing from their customers. Some provide templates, some specify bleed settings (*see Page 4*), some will request the native packaged InDesign files (which can be risky if you'd rather not have anyone alter your file) and some are happy to receive a print-ready PDF.

Here we look at how you can produce the latter - a **print-ready PDF** with printer's marks, which usually works a treat.

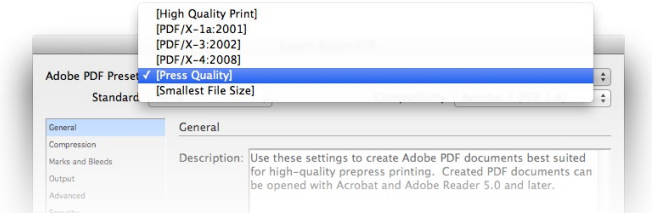
Once you've preflighted your document (*see Page 12*) and checked for spelling errors, you are ready to export for print.

Go to **File > Export**. You will be prompted to save the exported file in a location on your computer and to give it a name.

From the **Format** drop-down options at the bottom of the window select **Adobe PDF (Print)** and click **Save**.



In the **Export Adobe PDF** window that opens, select **Press Quality** from the top option, **Adobe PDF Preset**. This will create a very high-quality file, suitable for digital and litho printing.

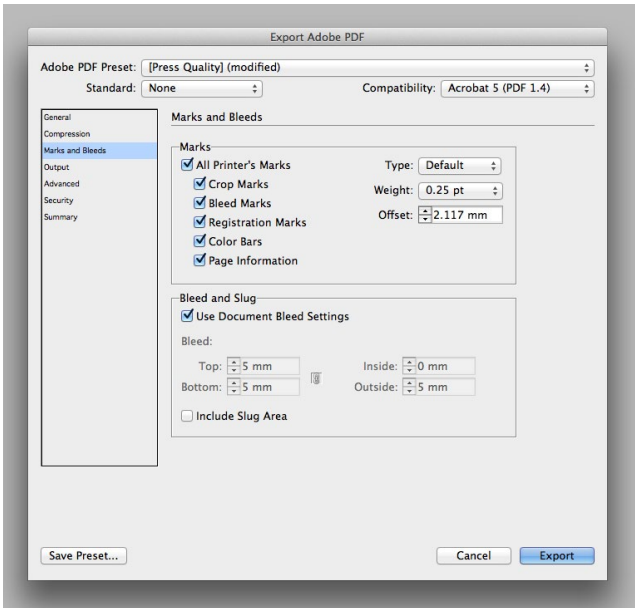


To the left of the **Export Adobe PDF** window you will see a menu with a number of options. Click on **Marks and Bleeds**.

Unless your printer has specified only some marks to be included, under **Marks** check **All Printer's Marks** to highlight all the options below it.

Under **Bleed and Slug** check **Use Document Bleed Settings**. If you have included a **Bleed** (*see Page 4*), as recommended if you have any elements or colors which cross the edges of pages, the bleed's dimensions will appear in the window.

Click **Export** at the bottom right of the window (check the **View PDF after Exporting** box under **General** to view the result immediately) and you're done! ●



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